

**Department of Personnel Administration  
Memorandum**

**TO: Personnel Management Liaisons (PML)**

|  |                                      |
|--|--------------------------------------|
| <b>SUBJECT:</b><br>Long Term Disability Insurance Open Enrollment for Excluded Employees | <b>REFERENCE NUMBER:</b><br>2008-007 |
| <b>DATE ISSUED:</b><br>01/31/08  | <b>SUPERSEDES:</b><br>2008-004       |

This memorandum should be forwarded to:

**Personnel Officers  
Personnel Transactions Supervisors  
Personnel Transactions Staff**

**FROM:** Department of Personnel Administration  
Benefits Division

**CONTACT:** Susan Wong, Benefits Program Analyst  
(916) 324-0533  
Fax: (916) 324-3213  
Email: [susanwong@dpa.ca.gov](mailto:susanwong@dpa.ca.gov)

Open enrollment for the Long Term Disability (LTD) Insurance Plan for excluded employees will be held from ***March 1, 2008 through April 30, 2008***. This memo provides information on the eligibility criteria, effective dates of coverage, and the various communication methods that will be used to provide open enrollment information to eligible employees.

**Eligibility Criteria**

An employee must be permanent or probationary, excluded from collective bargaining, have a time base of half-time or greater, and have one of the following designations:

- Managerial (M, E59, E79, E99)
- Supervisory (S, E48, E58, E68, E78, E98)
- Confidential (C, E97)
- Excluded/Exempt (E88, E89, E92)
- E01 through E21, E67, E77

Employees on limited-term appointments who otherwise meet the eligibility criteria may enroll in the LTD plan only if they have a mandatory right of return to a position that meets the above criteria. Excluded employees who are appointed to permanent-intermittent positions are not eligible.

***Rank-and-file employees are not eligible for this insurance program.***

## Employee Communications

- **Eligible employees NOT currently enrolled in the LTD Program** - In early February 2008, the Department of Personnel Administration (DPA) will mail a notice of the upcoming open enrollment to the homes of approximately 30,000 eligible employees. The notice will announce the upcoming open enrollment period. In late February, these employees will receive an enrollment packet with a detailed plan brochure, enrollment instructions, and an enrollment form. In mid-April, a final reminder post card will be mailed to employees reminding them that the open enrollment period will end on April 30, 2008.
- **Employees currently enrolled in the LTD Program** - In mid-February, a post card announcing the open enrollment period for the plan will be mailed to current enrollees. This post card will advise them on how they can make plan option changes and that enrollment forms can be obtained from their personnel office. For questions or additional information about the plan, employees should contact Standard Insurance Company (The Standard) at 1-888-641-7193 or go online to [www.standard.com/mybenefits/california](http://www.standard.com/mybenefits/california).

The February issue of the "Benefits News," distributed by DPA to departmental personnel offices and employee organizations, will announce the open enrollment and provide program information. Please feel free to reproduce, distribute, or post this newsletter on bulletin boards or email notifications to notify your employees of the upcoming LTD open enrollment period. There will also be a global message on the March 1, 2008, paycheck stub reminding employees of the LTD open enrollment.

## Completion of the LTD Enrollment Authorization Form

During open enrollment, enrollees are required to complete Sections A, B, and C of the LTD enrollment authorization form (SI7533D-643146) and submit the form to their departmental personnel office.

When personnel offices receive the enrollment form, they are responsible for verifying that the information is completed correctly in Sections B and C, completing Section D, and submitting the enrollment form to the State Controller's Office (SCO) by the dates indicated below.

## Effective Date of Coverage

Completed enrollment forms (processed through personnel offices) received at SCO by March 10 will have coverage effective April 1, 2008. Forms received by the SCO from March 11 through April 10 will have coverage effective May 1, 2008. Forms received by SCO April 11 through May 9, 2008 will have coverage effective June 1, 2008. Forms received by SCO after May 9, 2008 will be rejected. Appeals will be approved by DPA on a case-by-case basis.

### **LTD Plan Brochures and Enrollment Forms**

To help minimize your workload during the LTD open enrollment, The Standard will be the primary contact for the distribution of plan information and enrollment forms. However, a small number of employees may contact you directly for LTD information and forms. Please ensure you have an adequate supply of brochures and forms. You may call The Standard at 1-888-641-7193 or via email [socltforms@standard.com](mailto:socltforms@standard.com) to order a supply of LTD forms (SI7533D-643146) and brochures (SI10386-643146).

### **Fill and Print Link Form**

A Fill and Print LTD enrollment form is now available online at The Standard's website. Employees can complete the form online, print it out, and then give it to their personnel office. This fill and print form must have an original signature or the State Controller's Office will not process it.

If employees have questions you cannot answer, please direct them to The Standard's dedicated website at [www.standard.com/mybenefits/california](http://www.standard.com/mybenefits/california) or the toll-free customer service line at 1-888-641-7193.

Since the last open enrollment for this plan was conducted in October 2006, we anticipate a great deal of interest from eligible employees, and we appreciate your help informing employees about the LTD plan and the open enrollment.

If you have questions, please contact Susan Wong at (916) 324-0533.

/s/Greg Beatty

Greg Beatty  
Chief, Benefits Division